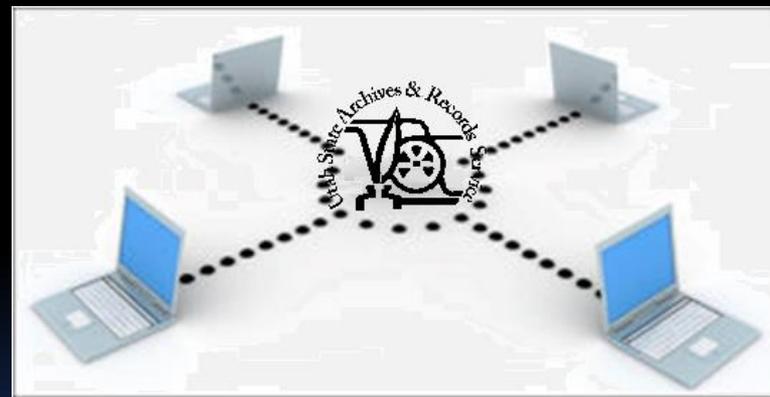
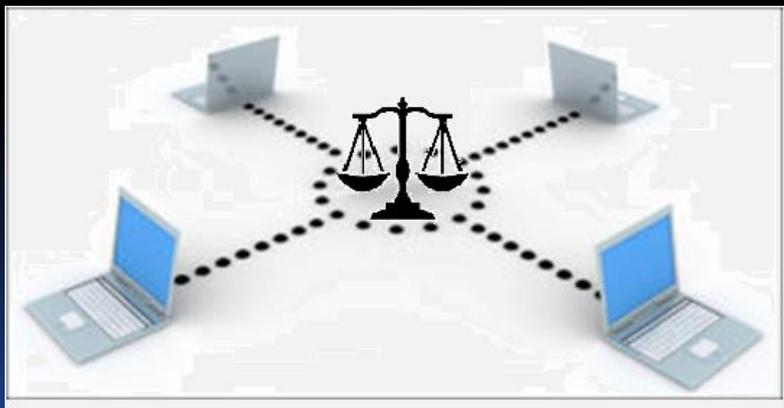
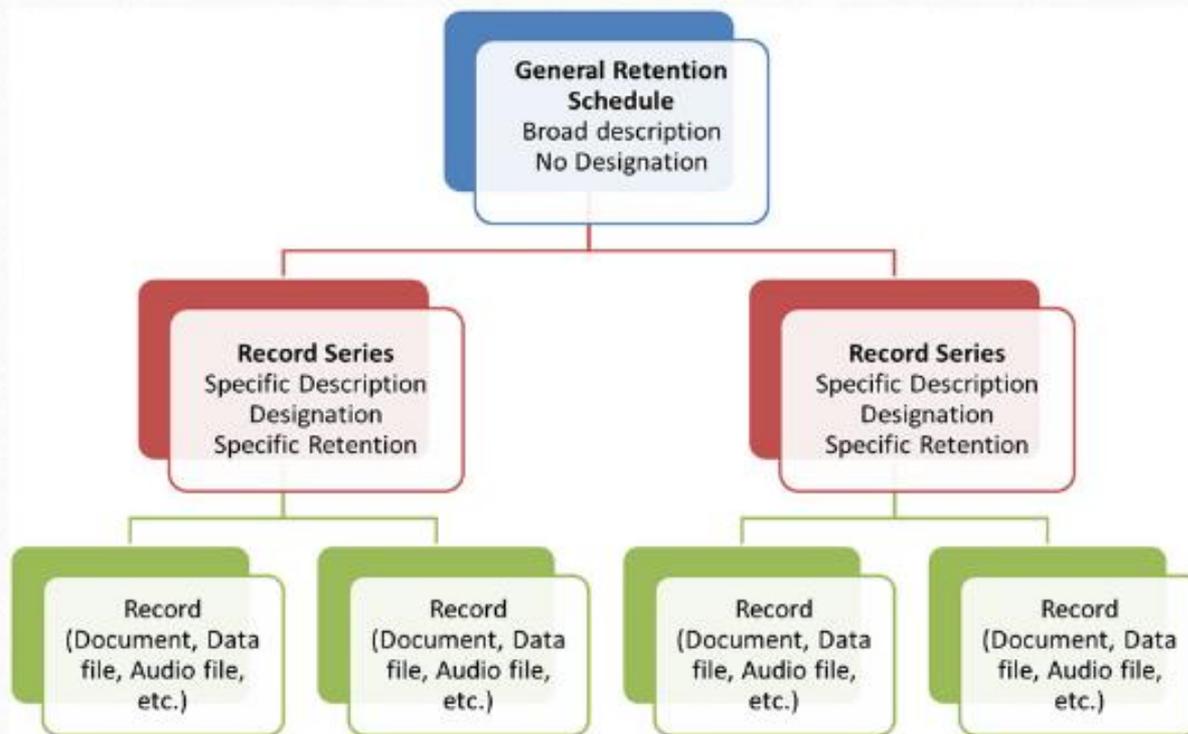


Using Retention Schedules For Education Records





Retention Schedule Types



The Utah General Retention Schedules, created and maintained by the Utah State Archives, describe a group of like records (based on function and appraisal) and stipulate their retention and disposition.

Why the Archives makes General Schedules

HOME / RECORDS MANAGEMENT / STATE GENERAL SCHEDULE

STATE AGENCY GENERAL RECORDS RETENTION SCHEDULE

Items listed in general retention schedules identify records which may or may not exist in any given agency. They are models to follow if a governmental entity's records closely approximate the descriptions. All records are governed by either the agency's own properly adopted retention schedule or general retention schedules ([63G-2-604](#)).



- [Administrative Records \(1\)](#)
- [Budgeting Records \(2\)](#)
- [Cartographic Records \(3\)](#)
- [Communication Records \(4\)](#)
- [Data Processing Records \(5\)](#)
- [Facility Management Records \(6\)](#)
- [Financial Records \(7\)](#)
- [Human Resource Records \(11\)](#)
- [Motor Vehicle Maintenance and Operation Records \(9\)](#)
- [Payroll Records \(10\)](#)
- [***Printing Records \(12\) OBSOLETE](#)
- [Property Records \(14\)](#)
- [Purchasing Records \(13\)](#)
- [Public Affairs Records \(15\)](#)
- [Security Services Records \(16\)](#)
- [Law Enforcement \(17\)](#)



General Retention Schedules

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- + More

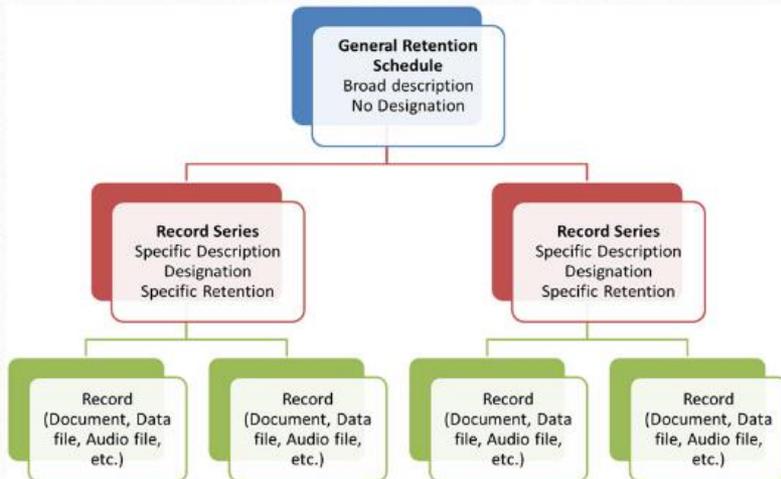
- State General Retention Schedule (or PDF)
 - General Schedules for Departments (only a few have created their own general schedule)
- County General Schedule (or PDF)
- Municipal General Schedule (or PDF)
- School District General Schedule (or PDF)
- Court Retention Schedule
- Legislative Retention Schedules (see Appendix A)
- General Schedule Updates, August 2015
- General Schedule Updates, October 2016
- Retention Schedules under review (updated monthly)

Agency-Specific Schedules

Entity name:

Browse: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Series number:



The Utah General Retention Schedules, created and maintained by the Utah State Archives, describe a group of like records (based on function and

School District General Retention Schedule



These general schedules are still in the creation/approval process. Those with links have been approved by the [State Records Committee](#). As more become approved, they will be made available. For questions regarding the status of any school district general schedule, contact Glen Fairclough at (801) 531-3841.

Items listed in general retention schedules identify records which may or may not exist in any given agency. They are models to follow if your records closely proximate the descriptions.

General Schedule for All School District Offices

- [Administrative records \(1\)](#)
- [Bonds and bonding records \(2\)](#)
- [Budget records \(3\)](#)
- [Fixed asset records \(4\)](#)
- [General accounting records \(5\)](#)
- [Payroll records \(6\)](#)
- [Purchasing records \(7\)](#)
- [Risk management records \(8\)](#)



School District Offices

- [Child accounting/attendance records \(9\)](#)
- [Facilities records \(11\)](#)
- [Food services records \(12\)](#)
- [Library/media center records \(13\)](#)
- [Personnel records \(14\)](#)
- [School board records \(15\)](#)
- [Special education records \(16\)](#)
- [Student records \(17\)](#)

School Records

- [All Schools\(19\)](#)

School District Schedule 17 Student Records - Active

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Contents (or view both active and obsolete schedules together)

Attendance (17-26)

Compliance Certification Forms (17-14)

Discipline (17-30)

Graduation Certificates (17-15)

Enrollment and Registration (17-27)

Graduation and Transcripts (17-32)

Homeless Student Report (17-19)

Medical Log Records (17-28)

Monthly Homeless Children and Youth Statistical Report (17-20)

Non-resident Student Report (17-18)

Non-transferred Student Files (17-23)

Performance and Testing (17-29)

Permission and Passes (17-31)

Student Exchange Records (17-13)

Student History (17-25)

Student Visa Case Files (17-12)





Graduation and Transcripts (SD 17-32)

Official transcripts document students' graduation from high school and verify classes attended and credits earned. Transcripts should note suspension and expulsion from school. Transcripts of students who did not graduate are included in this schedule.

Retention: Retain 20 years and then transfer to Archives. Utah Code 53A-11-907 (2013).

(Approved 08/2013)



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(Approved 08/2013)



Benefits to using the General Retention Schedules

- 1. Most of the work is done!**
- 2. Quicker to send records to Clearfield!**
- 3. Determining if your needs are unique.**
- 4. Compliance**

The General Schedule Update

- Format Neutral Information specific
- State and Local
- No more classification
- Available for review
- Approved by the State Records Committee

Financial schedule draft:

Email sent to 1,115 AROs asking if they'd like to be involved.

-27 undeliverable

-INTERESTED! – 20 offices, 27 contacts -

5 special districts

6 municipalities

4 school districts

2 counties

3 state agencies

-15 representatives at the meeting

Need Feedback from Stakeholders



- Blog
- Email
- Website



Records Keepers – Utah State Archives
State & Local Government Records Service

Home About Meet the Authors Online Records Officer Certification FAQ

New County Petition General Schedule

June 9, 2016 by rebekkahshaw [Leave a comment](#) [Edit](#)

No schedules will be presented to the State Records Committee today, but we anticipate the previously posted financial schedules and the following two county schedules will be presented July 7th.

We are updating county schedule 14-32, but the retention will not change. We also propose adding a new schedule for the signature sheets related to petitions. If you have input or questions regarding these schedules, please contact Rebekkah Shaw at rshaw@utah.gov or 801-531-3851.

Petition Signature Records

These records are petition signature sheets signed by individuals wishing to add a candidate or initiatives to the election ballot. Signatures are verified to determine whether petitioners are

Attendance (SD 17-26)

- Minors between age 6 and 18 are legally required to attend school. These are records of student attendance, absence and tardiness.
- **Retention:** Retain for 4 years and then destroy.
- (Approved 08/2013)

Enrollment and Registration (SD 17-27)

- These records capture the necessary information to enroll a student in a particular school and document their course of study. The application process of those seeking to home school or participate in alternative programs is included in this schedule.
- **Retention:** Retain until end of the school year, superseded or graduation and then destroy.
- (Approved 08/2013)

Permission and Passes (SD 17-31)

- These records document parent or guardian consent for their student to participate in an activity or leave school during school hours.
- **Retention:** Retain until end of school year and then destroy.
- (Approved 08/2013)

Medical Log Records (SD 17-28)

- These records are maintained to ensure that students meet mandated health requirements to attend school and to ensure that, as appropriate, medical needs are met during school hours.
- **Retention:** Retain for 3 years and then destroy.
- (Approved 08/2013)

Discipline (SD 17-30)

- Student misconduct may be the subject of disciplinary action if the conduct disrupts the educational environment, threaten or harm persons or property, or disrupt school activities. Any record or information that is created or used to address student misconduct is included.
- **Retention:** Retain until issue resolved AND administrative need ends and then destroy. Do not retain past graduation.
- (Approved 08/2013)

Performance and Testing (SD 17-29)

- These records document student performance and educational history. They include test scores, grades, and any other progress or performance measures.
- **Retention:** Retain for 3 years after graduation or after student leaves the school and then destroy.
- (Approved 08/2013)

Graduation and Transcripts (SD 17-32)

- Official transcripts document students' graduation from high school and verify classes attended and credits earned. Transcripts should note suspension and expulsion from school. Transcripts of students who did not graduate are included in this schedule.
- **Retention:** Retain 20 years and then transfer to Archives. Utah Code 53A-11-907 (2013).
- (Approved 08/2013)

Student History (SD 17-25)

- This information includes each student's name, date of birth, parents or guardians; date student entered and exited the school and the number of days in attendance.
- **Retention:** Permanent. Retain for twenty years, then transfer to Archives. DREAM ACT, S. 952, H.R. 1842, S. 1258.
- (Approved 08/2013)

Any Questions?





State Archives Assistance

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801.531.3858